

SOAR Online Course – Child Curriculum Practice Case Guide

Use this checklist to track your Practice Case tasks.

Practice Case 1: Meet Your Client

- ☐ *Prepare for the Practice Case:* Review the Practice Case Guide (*this document*), SSA Forms Guide, and Practice Case Medical Summary Report (MSR) Tips.
- ☐ *Gather information:* View the interview video (this is the first of three segments); read the SOAR Referral Form and Progress Notes.
- ☐ *Save to your computer:* Four SSA forms and the MSR Interview Guide and Template (use this tool to help guide you as you gather information about the applicant and write your MSR).

Practice Case 2: Complete the SSA-827 and SSA-1696

- ☐ *Gather information:* View the second segment of the applicant interview video; read progress notes and medical record provided.
- ☐ **Upload completed SSA Forms to your Practice Case Application Packet.**
 - a. SSA-827: Authorization to Disclose Information to SSA
 - b. SSA-1696: Appointment of Representative

Practice Case 3: Complete the SSA-8000

- ☐ *Gather information:* View the last segment of the applicant interview video; read progress notes and medical records provided.
- ☐ *MSR:* Begin writing the Personal History section.
- ☐ **Upload completed SSA Forms to your Practice Case Application Packet.**
 - a. SSA-8000: SSI Application

Practice Case 4: Review Medical and Education Records

- ☐ *Gather information:* Read progress notes, medical records, and school records provided; review previous videos as needed.
- ☐ *MSR:* Complete the Personal History, Physical Health and Psychiatric History, and Educational History sections.
- ☐ *SSA Forms:* Begin working on the SSA-3820: Child Disability Report.

Practice Case 5: Complete the SSA-3820

- ☐ *Gather Information:* Review the SSA-5665: Teacher Questionnaire; Review the SSA-3379: Function Report; review previous videos as needed.
- ☐ *MSR:* Complete the Functional Areas section.
- ☐ **Upload completed SSA Forms to your Practice Case Application Packet.**
 - a. SSA-3820: Child Disability Report

Practice Case 6: Complete the Medical Summary Report (MSR)

- ☐ *Gather Information:* Review the Practice Case MSR Tips; review previous videos as needed.
- ☐ **Upload** completed *Medical Summary Report (MSR)* to your **Practice Case Application Packet**.

Practice Case 7: Review and Submit Your Application Packet

- ☐ Review all items in your Practice Case Application Packet; confirm all items are complete.
 - a. Four SSA forms and your Medical Summary Report (MSR)
- ☐ Click button to **Submit your Application Packet and Complete the Course**.
- ☐ Check your email for a confirmation that your packet has been submitted.